

6th Annual Client Experience Survey – Turning Insight into Action

We're excited to share the 6th annual Client Experience Relationship Survey results and help illustrate how the feedback gathered from this survey can be used to our greatest advantage.

Year over year there is a sustained effort to satisfy and retain our clients. This survey plays a key role in uncovering opportunities that we can prioritize and act on to achieve just that.

What it means to “Close the Loop”

You may have heard the Client Experience team use the phrase, “close the loop” – but what does that really mean? Essentially, we open the loop by asking clients about their experience with Texas Capital Bank. The loop continues when we acknowledge and listen to the feedback received. This is where clients tell us exactly what they want or need. The loop begins to close when positive changes are implemented to make the experience we originally asked about, better.

Finally, we “close the loop” by letting clients know their feedback made a difference. Clients who feel like they are directly involved in transforming their bank interactions in a positive way tend to become more and more loyal to our relationship with them. This not only makes clients feel important, like their voice is being heard, but makes them more willing to share their experiences and contribute their opinions in the future.

Client feedback empowers success

The Client Experience (CX) team tailors survey questions to collect the most relevant insight from those experiencing it. Targeting questions to fit each individual invited to participate in the survey provokes a more reflective reaction and deeper discussion. Clients responding to our surveys tell us unequivocally what they care about most, and their feedback should guide business objectives while driving positive change.

Remember that being made aware of our clients' wants, needs and challenges is only one piece of the puzzle. Now it's time to start closing that loop by acknowledging feedback provided and push for an improved client experience.

The CX team has partnered with different groups across the bank to help facilitate this step. Survey results are provided to Sales Excellence as part of Opportunity Planning Sessions and are incorporated into Client Relationship Reviews. In a collaborative effort to advance and improve client engagement, we share results directly with RMs and TSOs, with the <Net Promoter Score (NPS) Guide>, showing how to take advantage of the score provided. These communications help shine a light on which clients are speaking out, what they are saying and how to respond in a way that builds stronger relationships and reference opportunities.

Survey follow-up tasks will be added in Salesforce as we start to close that loop. Responses can also be found in the Relationship tab on Salesforce so anyone who accesses a relationship can see and understand how to better serve that client.

Utilizing the new Case Management tool in Salesforce, Support teams followed up with clients on any service needs that may have been uncovered in the survey. This tool streamlined the documentation of any interaction clients have with our support teams, while helping to maintain the 360-degree view of client activity. Detail on any interaction can be found under “Cases” inside Salesforce.

Client Experience is empowering teams across the bank with this information and providing a better, faster, more efficient way to use it.

Survey participation equals results

The CX team uses every year to boost survey participation and provide a space for clients to openly share their experience and ideas with us. CX partnered with Marketing to upgrade the visual quality of the survey invite and embed the Net Promoter Score (NPS) question right in the email. This made it easier for clients to know exactly what we were asking and quickly respond to the survey.

While each survey provided targeted insights, a few standard questions are asked to gauge the temperature of how clients feel about doing business with the bank. Here’s what CX found:

1. Net Promoter Score® (NPS)

- *“How likely is it that you would recommend Texas Capital Bank to a friend or colleague?”*
- Industry Benchmark for Financial Institutions: 21 *
- TCB Score: **XX** (↑X point from 2019) **

2. Customer Satisfaction (CSAT)

- *“How would you rate your overall satisfaction with Texas Capital Bank?”*
- TCB Score: **XX%** (↑X% from 2019) **

3. Customer Ease Score (CES)

- *“Is Texas Capital Bank easy to do business with?”*
- TCB Score: **XX%** (↑X% from as 2019) **

We can all agree that listening to client feedback and acting on what we learn is an essential part of differentiating the quality of service at Texas Capital Bank. If you’d like to learn more about how to use client feedback to your greatest advantage, Client Experience is eager to help! We’re also interested in hearing what clients say outside of the survey. If you receive any kind of feedback on products or the services – positive or negative – please, share it with us at: clientexperience@texascapitalbank.com.

**Temkin 2018 Benchmark Study*

***Blended score based on 2020 Treasury and Loan Key Contact Survey*